

# Colorado Medical Assistance Program Web Portal

## Trading Partner Administrator User Guide

The **Trading Partner Administrator (TPA)** is the person ultimately responsible for the use and administration of the Colorado Medical Assistance Program Secure Web Portal (Web Portal) within your office, including assigning user accounts to staff members. Your **TPA** account or **User Name** is the initial account that you are issued in your **Web Portal Welcome Letter**. Your **TPA User Name** is made up of the following items:

**COTP + Your facility's Trading Partner Number + A**

For example, the **User Name COTP000000A** means the following:

**COTP** = Colorado Trading Partner

**000000** = Trading Partner ID

**A** = User Name ending letter

When you enroll to use the Web Portal, you will also receive a letter from EDI Gateway, Inc. The Department of Health Care Policy and Financing's fiscal agent will provide a **User Name** and **Password**. The **User Name** and **Password** provided in the letter from EDI Gateway, Inc. **is not** your Web Portal **User Name** and **Password**. The **Web Portal Welcome Letter** from the Department contains your Web Portal **User Name** and temporary **Password**.



*If it has been at least ten (10) business days since you received your EDI Gateway letter, and you have not yet received your **Web Portal Welcome Letter** from the Department, please contact the Department Security Administrators for assistance at 303-866-4473.*

### Security of the Web Portal

In order to be compliant with the Health Insurance Portability Accountability Act (HIPAA) regulations, the Web Portal has increased security. All information is exchanged using secure transmission channels, data encryption, firewalls, and virus protection to protect and secure the client information. Because of these security features, all users must login to a secure Web site.

In the Web Portal, each Trading Partner's data is secure. The data associated with a specific Trading Partner is only accessible by a Trading Partner's users and cannot be accessed by users from another Trading Partner.

As a **TPA**, you will play a critical role in protecting the security and integrity of the Web Portal. It is very important for the **TPA** to make sure that only the appropriate people have access into the Web Portal.

- In order to access the Web Portal, each user will need to have a unique **User Name** (login ID) and **Password**. The **TPA** cannot create **User Name** that are similar in format to the **TPA User Name** (the COTP format) issued to each agency/provider by the Department. The format of the **User Name** must be unique.
- It is the responsibility of the **TPA** to assign the **User Name** and initial **Password** to each of the individual users of that Trading Partner.
- The **TPA** will determine which functions and transactions each user can access and perform based on that user's job duties and responsibilities. This is done by the **TPA** by assigning the user with specific **Roles**.
- The **TPA** will also terminate any user's access to the system if a user resigns or is terminated from their job, or if a user's job responsibilities or duties no longer require them to access the Web Portal.
- A **TPA** cannot create a user with **Trading Partner Admin Role**. A Trading Partner agency will have only **one** user with **Trading Partner Admin Role**, which is your COTP ID.

## **What is the Web Portal?**

The Web Portal is an online, web-based means of interactively submitting and receiving client information to/from the Medicaid Management Information System (MMIS). Information entered into the Web Portal and submitted to the MMIS utilizes HIPAA-compliant transaction formats.

Web Portal users will be able to complete the following functions when assigned by the TPA:

- Data Maintenance (Client and Provider)
- Client Eligibility (270/271)
- Claims Submissions and Adjustments (837)
- Claims Status Inquiry (276/277)
- Prior Authorization Request (PAR) Status Inquiry
- File and Report Service (FRS)
- Medicaid Provider Lookup
- (MMIS) Provider Data Maintenance
- Code Set Maintenance (procedure, diagnosis, etc...)

As a TPA, you will be able to work in the following functional areas:

- User Maintenance
- System Reports
- Claims/PAR Purge

The following are discussed in this guide. Click on the link to jump to that section:

<b>Area</b>	<b>Topics Covered</b>
<a href="#"><u>Accessing the Web Portal</u></a>	Logging On and Logging Off , using the Main Web Portal Screen, changing your password
<a href="#"><u>Getting Support</u></a>	Where to find sources of Web Portal assistance from Online Help, Online Training, User Guides, answers to Frequently Asked Questions, when to contact the Help Desk, and obtaining Provider Support
<a href="#"><u>Trading Partner Administrator Functions</u></a>	Explanation of the role of the TPA, setting up and maintaining user accounts, and setting claim and PAR purge criteria
<a href="#"><u>System Reports</u></a>	Review your Trading Partner ID login activity for users

## Accessing the Web Portal

You can access the Web Portal from the Department's public website at [www.colorado.gov/hcpf](http://www.colorado.gov/hcpf).

- Click on the For Our Providers link from the top navigation bar.
- Click on the Provider services (training, & more) link to go to the Provider Services page.
- Access the Web Portal by clicking on the Web Portal link.

## Logging On and Logging Off

### Initial Log On

Have your **Web Portal Welcome Letter** handy when signing on as the **TPA** for the first time. It contains the information you will need in order to log into the Web Portal.

1. Enter the **User Name** assigned to you in the **User Name** entry box (Figure 1). In the **Welcome Letter**, it is the text found on the line called: **Web Portal Trading Partner User Name**.

Department of Health Care Policy and Financing

Related Sites: Provider Services CHP+ CACP Old Age Pension HIPAA

## Colorado Medical Assistance Program Web Portal

### Login

Access to this application is restricted to those who have been authorized by the Colorado Department of Health Care Policy and Financing. The department is tracking all users in the system and all uses of the system. All unauthorized activity will be prosecuted to the full extent of the law.

User Name:\*

Password:\*

Note: Password is case sensitive

[I forgot my user name.](#)

[I forgot my password.](#)

**System Status Messages:**

The Portal is currently available.

Colorado Department of Health Care Policy and Financing - 1570 Grant Street Denver, Colorado 80203-1818

Contact Us:

[HCPF Home](#) - [StateHome](#)

[Privacy Statement](#)

Figure 1 – Web Portal Login Screen

2. Enter the **Password** found in the **Welcome Letter** line titled: **Web Portal Trading Partner INITIAL password**. Enter it exactly as shown in the letter.
3. Click on the **Login** button.
4. Review the **User Agreement** and **Password** sections on the Web Portal User Welcome screen (Figure 2) and click the **OK** button.

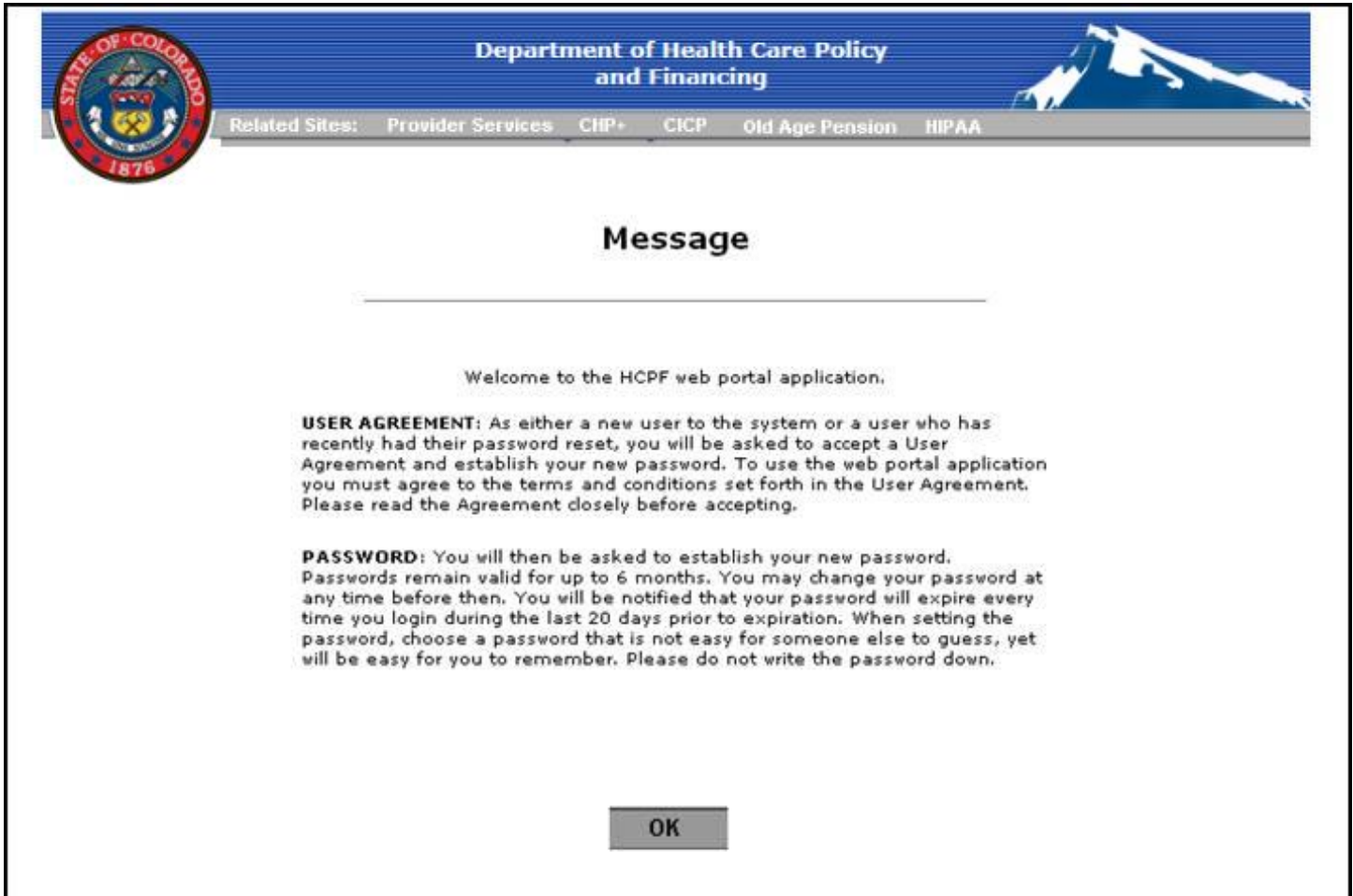



Figure 2 – Web Portal Welcome Message

5. Read and accept the **Web Portal User Agreement** (Figure 3).



## Colorado Medical Assistance Program

### Web Portal User Agreement

**The following Agreement explains how you may use the Web Portal and your responsibilities and obligations as a user.**

**PLEASE READ!**

**By clicking on the “Accept” box, you consent and agree to be bound by all of the terms and conditions below, and you understand that any failure to comply with the terms and conditions may result in sanctions, which can include termination of your user account.**

Users understand that the Colorado Department of Health Care Policy and Financing (Department) solely owns the Web Portal application and the information that can be accessed through the Web Portal. Access to the Web Portal is restricted to those who have been authorized by the Department and their Trading Partner/Provider to enter.

Users shall only use/disclose records and/or information that is created, received, maintained, or transmitted within the Web Portal as authorized by the Department, and as required to perform authorized Trading Partner/Provider obligations and responsibilities.

Users shall limit use/disclosure of records and/or information concerning Colorado Medical Assistance Program clients to the purposes directly connected with the administration of the Colorado Medical Assistance Program.

Users shall not knowingly cause or allow the addition, modification, destruction or deletion of any records and/or information accessible through the Web Portal, except solely in the course of performing their authorized work.

Users shall not make unauthorized use/disclosure of, or knowingly permit unauthorized access by others to, records and/or information.

Users shall maintain an assigned, unique User Name. Users understand that they are responsible for any activity that occurs under their individual User Name. In the event that a User suspects that another person knows and/or has used his/her User Name and Password, the User must notify his/her Trading Partner/Provider immediately. Additionally, it is a security violation for a User to mask his/her identity or assume the identity of another User in order to gain access to the Web Portal.

Users shall practice adequate Password management by keeping Passwords confidential. Users shall not share their Passwords with anyone else for any reason, and are discouraged from writing down their Passwords or leaving Passwords posted in view of others.

Users understand that all Users and uses of the Web Portal will be recorded and tracked, and may be monitored by the Department.

Users shall not attempt to alter, exploit, or otherwise interfere with the Web Portal application. The Department may update the Web Portal application at any time.

**Figure 3 – User Agreement Screen**

6. Click on the **Accept** or **Decline** button. If you click on the **Decline** button, you will not be able to enter or use the Web Portal. When the **Accept** button is clicked, you will be directed to the Change Password screen, where you will be required to change your **Password** (See: [Change Password](#)).
7. After your password is changed, you will be required to complete your User Profile. The User Profile must be completed before you are given access to the Web Portal.



**Figure 4 – Password Changed Successfully**

8. Click **Yes** to complete the User Profile. For assistance, please view the ***User Profile Maintenance User Guide***.
9. When finished using the Web Portal, click on **Log Out** located on the main menu bar. **This is the recommended way to terminate your session on the Web Portal.**

*Review the information under Trading Partner Administrator Functions in order to set up user accounts properly.*



## Subsequent Log On, Log Off

After the initial log in to the Web Portal is finished and you have created your own **Password**, when logging in again, use your assigned **User Name** and the **Password** you created during the initial log in process.

- You will be logged off the Web Portal automatically after 30 minutes of inactivity. A pop-up warning will appear when 5 minutes are left in the session.
- You can have only one valid login session open at a time. Once you are logged on to the Web Portal at one PC, you cannot log on to the Web Portal at another PC using the same **User Name** and **Password** while the first PC login is active.
- You will be required to change your **Password** every six months. A reminder will appear within 15 days of the current password's expiration.
- You cannot reuse a previously used **Password**.
- You can use the “**I forgot my user name**” or the “**I forgot my password**” links from the Login screen to obtain a forgotten **User Name** or to reset your **Password**, provided you have completed the User Profile.
- Contact the Help Desk if you encounter problems using the “**I forgot my user name**” or “**I forgot my password**” links.
- Should a TPA have a suspended session due to entering an incorrect **Password**, the Help Desk can assist you to reset the account. The Help Desk will only reset accounts for the TPA; all other users **must** call their TPA if they are having difficulties logging in.

## The Main Web Portal Screen

After you successfully log on, the Main Web Portal screen will appear. This screen is divided into four sections: The Main Menu, the Message Center, the Menu Bar, and the Dashboard (Figure 5).

**Department of Health Care Policy and Financing**

Related Sites: Provider Services CHP+ CACP Old Age Pension HIPAA Main Help Log Out

Welcome [User Name] Trading Partner ID- 100073

**Welcome to the Colorado Medical Assistance Program Secure Web Portal**

Thursday, August 28, 2014

**What's New!**

**Claims Processing – Labor Day Holiday**

Due to the Labor Day holiday on Monday, September 1, 2014, the claims processing cycle will include electronic claims accepted before 6:00 p.m. Mountain Time (MT) on Thursday, August 28, 2014. The receipt of warrants will be delayed by one (1) or two (2) days. State offices, the CGI Help Desk, the Department's fiscal agent, DentaQuest, and the ColoradoPAR Program offices will be closed on Monday, September 1, 2014. Offices will reopen during regular business hours on Tuesday, September 2, 2014.

Based on your access rights Training, User Guides, and Help may be available in the upper gray bar or via the menu buttons.

A Trading Partner Administrator's first task should be to set up the users for their Trading Partner. Locate the Administration button in the menu and select User Maintenance. Additional information can be found in the Training and the User Guides.

**System Status Messages**

Claims	Last Week	First Week
Dental Claims		
Professional Claims		
Institutional Claims		

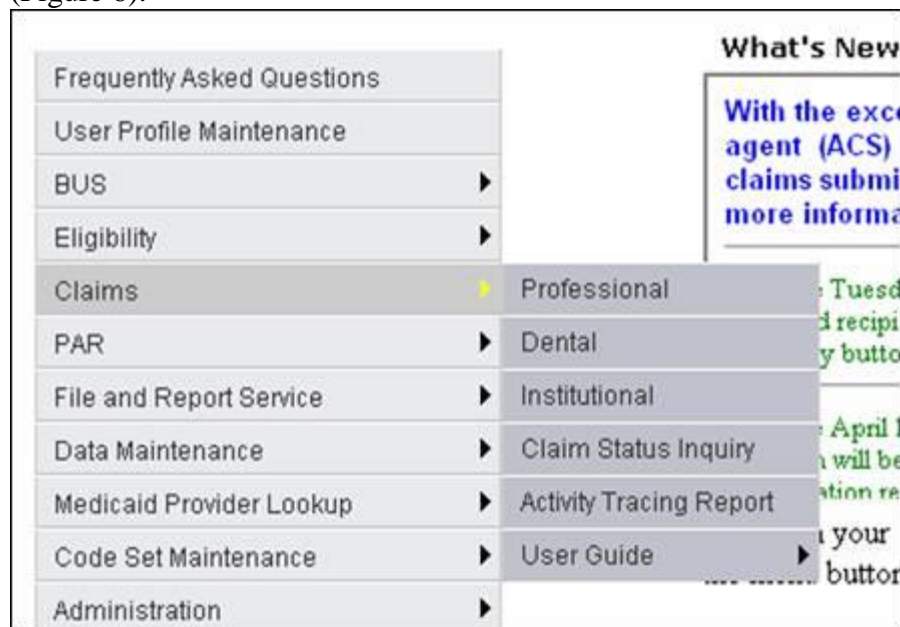
Eligibility	Last Week	First Week
Ineligible:		1 0
Total Responses:		1 0

PAR	Last Week	First Week

**Main Menu** **Message Center** **Dashboard**

Figure 5 – Main Web Portal Screen

The left side of the screen displays the **Main Menu**. The options that display on the **Main Menu** are determined by the roles assigned to the user. To select menu options, simply run your mouse over the selection to expand to the submenu (Figure 6).



**Figure 6** – Submenu Selection

### ***The Message Center***

The middle of the screen displays the Message Center, which shows key information for users and providers. This Message Center is updated often and is important to review it periodically.

### ***Dashboard on the Main Menu***

The right side of the screen contains the Dashboard. The Dashboard displays the current system status. In addition, it displays first and last week information on user claims and eligibility transactions.



### Changing Your Password

Your password can be changed at anytime by clicking on the **Change Password** button located on the Login screen. You must enter your **User Name** and current **Password** first, and then select the **Change Password** button (Figure 7).

The screenshot shows the login interface for the Colorado Medical Assistance Program Web Portal. At the top, there is a header with the Colorado Department of Health Care Policy and Financing logo on the left and a navigation bar with links: Related Sites, Provider Services, CHP+, CACP, Old Age Pension, and HIPAA. Below the header, the title "Colorado Medical Assistance Program Web Portal" is centered, followed by the "Login" heading. A disclaimer states that access is restricted to authorized users and that unauthorized activity will be prosecuted. The login form includes fields for "User Name:\*" and "Password:\*", each with a corresponding input box. Below these fields are two buttons: "Login" and "Change Password". A red note indicates "Note: Password is case sensitive". There are also two links: "I forgot my user name." and "I forgot my password.". A section titled "System Status Messages:" contains a message box stating "The Portal is currently available.". At the bottom, a footer bar provides the department's address: "Colorado Department of Health Care Policy and Financing - 1570 Grant Street Denver, Colorado 80203-1818". Below this, there is a "Contact Us:" section with a "Help Desk" button, a "DEPT. HOME" button, and links for "HCPF Home" and "StateHome". A "Privacy Statement" link is also present, along with a small icon of a house with a flag.

Department of Health Care Policy and Financing

Related Sites: Provider Services CHP+ CACP Old Age Pension HIPAA

## Colorado Medical Assistance Program Web Portal

### Login

Access to this application is restricted to those who have been authorized by the Colorado Department of Health Care Policy and Financing. The department is tracking all users in the system and all uses of the system. All unauthorized activity will be prosecuted to the full extent of the law.

User Name:\*

Password:\*

Login Change Password

Note: Password is case sensitive

[I forgot my user name.](#)

[I forgot my password.](#)

System Status Messages:

The Portal is currently available.

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Contact Us: Help Desk

DEPT. HOME HCPF Home - StateHome

[Privacy Statement](#)

Figure 7 – Login Screen

The following are the rules with regard to creating your **Password**:

- Must be between 8 and 16 characters
- Must contain at least one alphabetic character and one numeric character
- Is case-sensitive, such that “**mypassword1**” is not the same as “**MYPASSWORD1**”

The screenshot shows the 'Change Password' interface. At the top is a blue header with the Colorado Department of Health Care Policy and Financing logo on the left and a mountain graphic on the right. Below the header is a navigation bar with links: 'Related Sites:', 'Provider Services', 'CHP+', 'CICP', 'Old Age Pension', 'HIPAA', 'Main', 'Help', and 'Log Out'. The main content area has a title 'Change Password' followed by two input fields: 'New Password:\*' and 'Confirm New Password:\*'. Below these fields are 'OK' and 'Cancel' buttons. At the bottom, a grey bar contains the address 'Colorado Department of Health Care Policy and Financing - 1570 Grant Street Denver, Colorado 80203-1818'. Below this bar are links for 'Contact Us:', 'Help Desk', 'DEPT. HOME', 'HCPF Home', 'StateHome', and 'Privacy Statement', along with a small house icon.

**Change Password**

**New Password:\***

**Confirm New Password:\***

**OK** **Cancel**

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Contact Us: **Help Desk**

**DEPT. HOME** [HCPF Home](#) - [StateHome](#) 

[Privacy Statement](#)

**Figure 8** – Change Password Screen

Enter the new **Password** in the **New Password** field. Tab to or click in the **Confirm New Password** field and retype the **Password** entered in the **New Password** field. Click the **OK** button to save the new **Password**. If the new **Password** entered is accepted by the Web Portal, you will receive a confirmation screen that says your **Password** was successfully changed (Figure 9).



**Figure 9** – Password Changed Successfully

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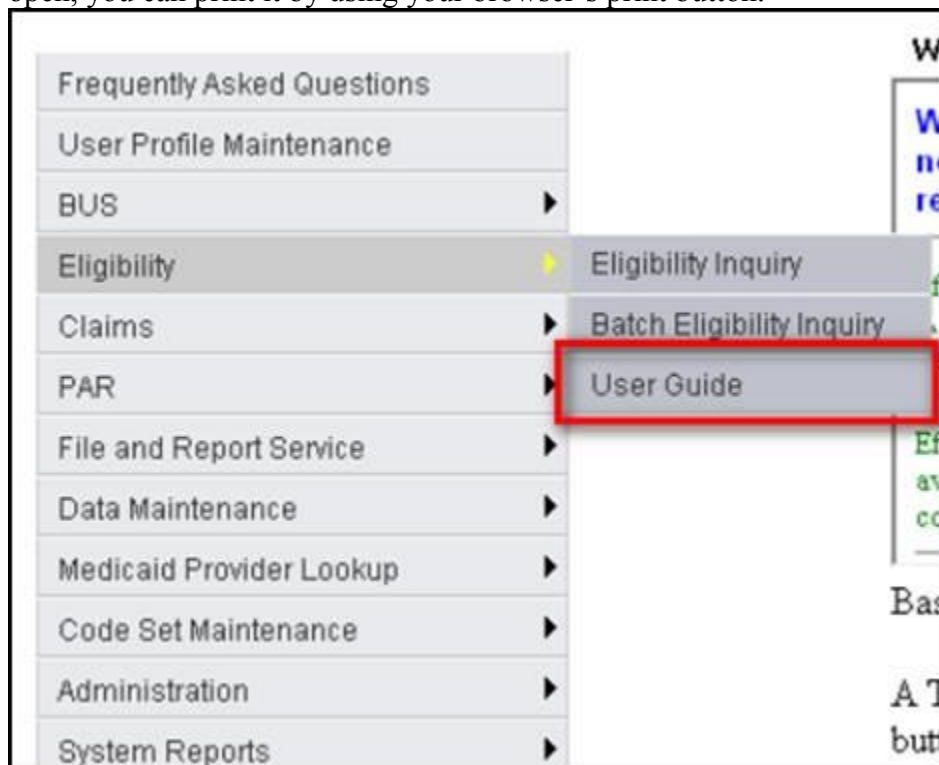
## Getting Support

### Online Training

Online training courses are available for review by clicking on the **Web Portal Training** → **Training** option located on the **Main Menu**.

### User Guides

For quick and easy reference, **User Guides** are available for most menu options by running your mouse over the menu selection to expand to the submenu. **User Guides** are located at the option's submenu (Figure 10). Once the guide is open, you can print it by using your browser's print button.



**Figure 10** – User Guide Location Example

### Online Help

The online help screens and field tooltips are the easiest and quickest way to find assistance while working within the Web Portal. You can access the help screens by clicking on **Help** in the Menu Bar. The help screen for the particular area of the Web Portal you are in will be displayed. For example, if you are in Eligibility Inquiry and click on **Help**, the help screen for Eligibility Inquiry will display. To print the help screen, place your mouse anywhere over the help screen, right-click your mouse, and select the **Print** option.

Tooltips are designed to help you with a specific field or button on a screen, and will appear when you place your mouse pointer over a field.

### ***Help Desk***

The **Help Desk** button allows for quick and easy access to Help Desk information. It contains an overview of the Web Portal, how to logon and logoff, and information on Online and Technical Support. This button is found at the bottom of each screen and can be clicked at any time.

### ***Technical Support***

If you experience technical difficulties with the Web Portal, please contact the Help Desk for technical support:

**Help Desk Phone:** 1-888-538-4275, Option 1

**Help Desk E-mail:** [HelpDesk.HCG.central.us@cgi.com](mailto:HelpDesk.HCG.central.us@cgi.com)

For TPA Password Resets, please contact Department Security Administrator:

**Phone:** 303-866-4473

**E-mail:** [HCPFSecurity@state.co.us](mailto:HCPFSecurity@state.co.us)

### ***Provider Support***

Choose the **Provider Services** option, located in the banner of each page, under Related Sites. Provider Services offers many tools to assist you. You will find provider manuals, HIPAA transaction companion guides, and bulletins that can be printed. The Provider Services can also provide support with:

- Enrolling Colorado Medical Assistance Program Providers.
- Providing education and billing assistance to enrolled providers.
- Receiving and processing Colorado Medical Assistance Program claims according to the Department's policy.
- Responding to provider inquiries.
- Preparing Department-required financial and utilization reports.
- Preparing and distributing reports, such as the Provider Claim Reports (PCRs).
- Adjusting claims as required.
- Accepting and reviewing reconsideration requests.

**Provider Services:** 1-800-237-0757

**Fax:** 303-534-0439

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## Trading Partner Administrator Functions

When a provider signs up to use the Web Portal, a person in that Trading Partner/Provider office should be designated as the Trading Partner Administrator (TPA). This person will be responsible for establishing Web Portal access for users in their office and for assigning **Roles** (access rights) to each user based on their particular job function. It is recommended that another person be designated as the Restricted Admin to assist with password and account resets in case of emergency, sickness, or vacation coverage of the TPA.

### Getting Started Using the Web Portal

Once you have received your **Web Portal Welcome Letter**, do the following:

- Log into the Web Portal using the Trading Partner Administrator (TPA) **User Name** and **Password** provided in the **Welcome Letter**.
- Change your **Password** as directed by the Web Portal, and complete your user profile for the TPA account.
- Once on the main screen of the Web Portal, click on **Administration** → **User Maintenance** from the left-hand navigation menu.
- Click on the **TPA** user name (**COTPXXXXXA**) in the User Lookup grid
- Enter your first and last name in the **Last Name** and **First Name** fields.
- Click on the **Save** button.

To add other users to the Web Portal:

- At the bottom of the User Lookup screen is the **Add New User** section. If you are going to complete daily activities in the Web Portal (such as submit claims, retrieve reports, complete client eligibility inquiries, etc.), enter a “daily” **User Name** for yourself in the field in the **Add New User** section, and click the **Add** button. Ensure the **User Name** is unique and not in a format of **COTPxxxxxA**.
- The User Maintenance screen will open for your new **User Name**. Complete the required fields (marked with an asterisk, \*), and assign the appropriate **Roles** by clicking on the **Role** in the **Available** box and then clicking on the **>** button to move the **Role** into the **Assigned** box. This will allow the particular **User Name** to access certain functions (claims, FRS, eligibility, PAR Inquiry, etc.) when logged into the Web Portal.
- Click on the **Save** button when all of the appropriate **Roles** have been assigned, and you will be returned to the User Lookup screen.
- Continue adding new users and assigning **Roles** until each of your staff that need access to the Web Portal to complete their daily job duties have a **User Name** with the appropriate **Roles**. Remember, your job as the TPA is to ensure staff is only accessing the minimum amount of client information necessary to complete their job duties. If your office staff does not have a legitimate job-related needs access to the Web Portal, do not give them a **User Name**. It is your responsibility to protect and limit access to the Web Portal.
- Provide the user with the **User Name** and **Password** you created when adding the user. When the user logs into the system for the first time, they will be prompted to change the **Password** and to create their User Profile.
- Remind users that their initial **Password** will expire in 21 days if they do not login in. When this happens, you will need to log back in as the TPA and reassign the **Password**.



*As a TPA, if you will be performing duties on a daily basis that are the same as other users (such as submitting claims, retrieving reports, etc.), you will need to create an additional **User Name** and **Password** for that purpose. The Department's issued TPA login is for performing the functions of the administrator only.*

Designate a user to be a **Restricted Admin**:

- Determine who in your office will serve as a **Restricted Admin**, to assist with any password resets for your users when you are out of the office.
- From the User Lookup screen, select the user's name from the grid or create a new **User Name** for him/her if one does not already exist.
- In the User Maintenance screen for the **User Name**, select **Restricted Admin Role** from the **Available** box. Use the > button to move the **Role** over to the **Assigned** box.
- Click on the **Save** button.



*Although the **Restricted Admin Role** is able to reset **Passwords** for other users, they may not reset the **Password** for the TPA account. To have the TPA **Password** reset, you will have to contact the Department Security Administrators at 303-866-4473 or [hcpfsecurity@state.co.us](mailto:hcpfsecurity@state.co.us). Click here to download the [Restricted Admin User Guide](#) instructions.*

## User Maintenance

The **User Maintenance** screen enables the **TPA** to perform the following functions:

- User Lookup
- Add New User
- Edit or delete existing users (the **COTPXXXXXA** account cannot be deleted, nor can the **Trading Partner Admin Role** be removed).
- Reset passwords
- Un-suspend user accounts
- Terminate a session in progress



### User Lookup

**User Maintenance** is located under **Administration** on the **Main Menu**. When **User Maintenance** is clicked, the User Lookup screen will display.

1. From the **Main Menu** roll your mouse over **Administration**, and then choose the **User Maintenance** option. The User Lookup screen will display (Figure 11).

**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHP+](#) [CICP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

#### User Lookup

User Name	Last Name	First Name
<a href="#">USER ALPHA</a>	USER	ALPHA
<a href="#">USER BETA</a>	USER	BETA
<a href="#">USER GAMMA</a>	USER	GAMMA
<a href="#">USER DELTA</a>	USER	DELTA
<a href="#">USER EPSILON</a>	USER	EPSILON
<a href="#">USER ETA</a>	USER	ETA
<a href="#">USER THETA</a>	USER	THETA
<a href="#">USER IOTA</a>	USER	IOTA
<a href="#">USER KAPPA</a>	USER	KAPPA
<a href="#">USER LAMBDA</a>	USER	LAMBDA

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**Search Criteria:**

\*  \*  \*       Search      Reset

---

**Add New User**

User Name :       Add

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Contact Us: [Help Desk](#)

[DEPT. HOME](#)      [HCPF Home](#) - [StateHome](#)

Figure 11 – User Lookup Screen Example

2. To search for a user:

- Under **Search Criteria**, select the field to search on by using the drop-down arrow for the first box and click on the field title (Figure 12).



**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHIP+](#) [CICP](#) [Old Age Pension](#) [HIPAA](#) [Main](#) [Help](#) [Log Out](#)

**User Lookup**

User Name	Last Name	First Name
<a href="#">USER ALPHA</a>	USER	ALPHA
<a href="#">USER BETA</a>	USER	BETA
<a href="#">USER GAMMA</a>	USER	GAMMA
<a href="#">USER DELTA</a>	USER	DELTA
<a href="#">USER EPSILON</a>	USER	EPSILON
<a href="#">USER ETA</a>	USER	ETA
<a href="#">USER THETA</a>	USER	THETA
<a href="#">USER IOTA</a>	USER	IOTA
<a href="#">USER KAPPA</a>	USER	KAPPA
<a href="#">USER LAMBDA</a>	USER	LAMBDA

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[\[Previous Page\]](#) [\[Next Page\]](#)

**Search Criteria:**

•  •  •       Search      Reset

**Add New User**

User Name :       Add

Colorado Department of Health Care Policy and Financing - 1570 Grant Street Denver, Colorado 80203-1818

Contact Us: [Help Desk](#)

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**Figure 12 – First User Search Criteria Field**

- Select the comparison method by clicking on the drop-down arrow in the second box (Figure 13).

**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHIP](#) [CICP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

**User Lookup**

User Name	Last Name	First Name
<a href="#">USER ALPHA</a>	USER	ALPHA
<a href="#">USER BETA</a>	USER	BETA
<a href="#">USER GAMMA</a>	USER	GAMMA
<a href="#">USER DELTA</a>	USER	DELTA
<a href="#">USER EPSILON</a>	USER	EPSILON
<a href="#">USER ETA</a>	USER	ETA
<a href="#">USER THETA</a>	USER	THETA
<a href="#">USER IOTA</a>	USER	IOTA
<a href="#">USER KAPPA</a>	USER	KAPPA
<a href="#">USER LAMBDA</a>	USER	LAMBDA

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**Search Criteria:**

[Search](#) [Reset](#)

**Add New User**

User Name :  [Add](#)

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Contact Us: [Help Desk](#)

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Figure 13 – Search Comparison Method Field

- Enter the value for which to search in the blank field (Figure 14).
- Click on the **Search** button to see the results display in the List Grid.
- Click on the **Reset** button to clear the search results when needed.

**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHIP+](#) [CICP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

**User Lookup**

User Name	Last Name	First Name
<a href="#">USER ALPHA</a>	USER	ALPHA
<a href="#">USER BETA</a>	USER	BETA
<a href="#">USER GAMMA</a>	USER	GAMMA
<a href="#">USER DELTA</a>	USER	DELTA
<a href="#">USER EPSILON</a>	USER	EPSILON
<a href="#">USER ETA</a>	USER	ETA
<a href="#">USER THETA</a>	USER	THETA
<a href="#">USER IOTA</a>	USER	IOTA
<a href="#">USER KAPPA</a>	USER	KAPPA
<a href="#">USER LAMBDA</a>	USER	LAMBDA

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**Search Criteria:**

**Add New User**

User Name :

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**Figure 14 – Search Value Field**

3. Sorting the List Grid: The grid can be sorted by any of the columns by clicking on the header of the column you want to sort. The entire grid will sort accordingly. The pointer icon is displayed in the column by which the grid is sorted. If the pointer is pointing up , then the data is sorted in ascending order. If the pointer is pointing down , then the data is sorted in descending order. To change the order, just re-click on the column heading.
4. A new user can be added from this screen or, if the user is already listed, just click on the desired **User Name**. Both options will take you to the User Maintenance screen.

### Add New User

From the **Main Menu**, select **Administration** → **User Maintenance**. Enter a user name in the **User Name** field. Each Web Portal user is assigned a name to identify them that is unique among the entire set of Web Portal users, across all Trading Partners. Use the following guidelines for creating unique **User Names**:

1. All users should have different user names but of a similar format:
  - Last Name and First Name Initial, for example, John Smith's user name can be set up as **SmithJ**. However, if **SmithJ** already exists, add a number to the user name such that **SmithJ2** would be the new **User Name**.
2. The user name must be at least 6 alphanumeric characters in length and not greater than a total of 16 characters.
  - If a name does not equal 6 characters, additional characters from the first name should be included. For example, user Dan Fox could be **FoxDan**, but not **FoxD** because it would be too short.
  - If a name is longer than 16 characters, the last name should be shortened accordingly.
3. The **TPA** cannot use the same format used by the Department to create **User Names** for their users.
4. If the user is new to the database, a blank User Maintenance screen will appear.
  - Complete all of the required fields. Required fields are identified by the red asterisk (\*) next to the field name.
  - Assign roles or access rights to the user by clicking on the role in the **Available** box and clicking on the **>** button. To remove a **Role**, click on the **Role** in the **Assigned** box and click on the **<** button. If **Roles** are not assigned to a user, the user will have access to only the basic functions of the Web Portal. If no roles are assigned, only **Data Maintenance** is accessible. To select multiple **Roles** for assignment, hold down the **Ctrl** key and click on each **Role**, then click the **>** button. For the changes to take effect, the user will need to log out and log back in again.
  - Review the **Roles** assigned to the user.
  - Click on the **Save** button. If an error exists with any of the entries, a message will appear (Figure 15). If no errors are encountered, the record will be saved and you will be returned to the User Lookup screen.
  - If the user already exists in the database, the error message **Record already exists in this database for this user name** will appear.

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### User Maintenance

- First name must be entered
- Last name must be entered
- Password must be entered.

Last Name: \*

First Name: \*

Middle Initial:

User Name: \*

☐ Suspended

☐ Session Locked

Password: \*

Confirm Password: \*

### Roles

Available:

- ELIGIBILITY INQUIRY USER
- CLAIMS USER
- PARS USER
- FRS USER
- PROVIDER(MMIS)
- RESTRICTED ADMIN

Assigned: \*

>

<

### Login History:

Last Successful Login:

Last Password Change:

Failed Login Count:

Last Failed Login:

Figure 15 – Adding a New User Field Errors

***Edit or Delete an Existing User***

For security purposes, it is very important for you as the **TPA** to make sure that only the appropriate personnel have access to the Web Portal. Therefore, when a user's job responsibilities have changed, review and update the user's account to ensure that the user's Web Portal access is appropriate. While the **TPA** can make changes to all other user accounts, the **TPA** cannot delete the **COTPXXXXXA** account, cannot assign other roles to the **TPA** account, and cannot remove the **Trading Partner Admin Role** from the **COTPXXXXXA User Name**.



*If a user has resigned or been terminated from employment, you must **immediately** delete their **User Name** from the Web Portal.*

1. From the **Main Menu**, select **Administration** → **User Maintenance**.
2. Search for the user's name in the User Lookup screen and click on the **User Name** to open the User Maintenance screen.
3. In the User Maintenance screen, review the information displayed to be sure that this is the user you wish to update or delete.
  - If updating the user information, make the changes and click the **Save** button.
  - If deleting the user, click on the **Delete** button (Figure 16). A confirmation box will appear. Click **OK**.



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### User Maintenance

Last Name: \*  First Name: \*   
Middle Initial:   
User Name: \*   
Password:  Confirm Password:   
☐ Suspended  
☐ Session Locked

**Roles**

Available:

- PARS USER
- FRS USER
- PROVIDER(MMIS)

Assigned: \*

- ELIGIBILITY INQUIRY USER
- CLAIMS USER
- RESTRICTED ADMIN

**Login History:**

Last Successful Login:	10/29/2010 4:32:09 PM
Last Password Change:	10/29/2010 4:31:31 PM
Failed Login Count:	0
Last Failed Login:	

Figure 16 – Delete a User

**Reset Passwords**

1. From the **Main Menu**, select **Administration** → **User Maintenance**.
2. Search for the user name in the User Lookup screen and select the user whose password you wish to change.
3. Enter the new password in both the **Password** field and the **Confirm Password** field.
4. Click **Save** to save the new password (Figure 17).

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**User Maintenance**

Last Name: \*  First Name: \*

Middle Initial:

User Name: \*

☐ Suspended

☐ Session Locked

Password:  Confirm Password:

**Roles**

Available:

- PARS USER
- FRS USER
- PROVIDER(MMIS)

Assigned: \*

- ELIGIBILITY INQUIRY USER
- CLAIMS USER
- RESTRICTED ADMIN

**Login History:**

Last Successful Login: 10/29/2010 4:32:09 PM

Last Password Change: 10/29/2010 4:31:31 PM

Failed Login Count: 0

Last Failed Login:

**Figure 17 – Reset a User Password**

**Un-suspend User Accounts**

A user account can become suspended after three incorrect password tries. The **TPA** can un-suspend the user account from the User Maintenance screen.

1. From the **Main Menu**, select **Administration** → **User Maintenance**.
2. Search for the user name in the User Lookup screen and select the user whose account you wish to un-suspend.
3. Locate the **Suspended** box. The box will have a check in it; uncheck the box.
4. Click **Save** to complete this action (Figure 18).



If a **TPA's** account is suspended, the **TPA** must contact the Help Desk (see [Getting Support](#) section).

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**User Maintenance**

Last Name: \* REGULAR USER First Name: \* ONE

Middle Initial:

User Name: \* REG000056A ☒ **Suspended**

☐ Session Locked

Password:  Confirm Password:

**Roles**

Available:

- PARS USER
- FRS USER
- PROVIDER(MMIS)

Assigned: \*

- ELIGIBILITY INQUIRY USER
- CLAIMS USER
- RESTRICTED ADMIN

**Login History:**

Last Successful Login: 10/29/2010 4:32:09 PM

Last Password Change: 10/29/2010 4:31:31 PM

Failed Login Count: 0

Last Failed Login:

**Save** **Cancel** **Delete**

**Figure 18** – Un-suspend a User

### Terminate a Session in Progress

Sometimes, a user can receive a message when they try to log in that they already have a session in process. This occurs if a user clicked on the **X** to close the Web Portal instead of using the **Log Out** option or if an error occurs on the Web Portal while the user is in an active session. The **TPA** can terminate a session in process from the User Maintenance screen.

1. From the **Main Menu**, select **Administration** → **User Maintenance**.
2. Search for the **User Name** in the User Lookup screen and select the user whose account you wish to release a session in progress.
3. Locate the **Session Locked** box. The box will have a check in it; uncheck the box.
4. Click **Save** to complete this action (Figure 19).

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**User Maintenance**

Last Name: \* REGULAR USER First Name: \* ONE  
 Middle Initial:   
☐ Suspended  
☒ Session Locked

User Name: \* REG000056A  
 Password:  Confirm Password:

**Roles**

Available: PARS USER  
FRS USER  
PROVIDER(MMIS)

Assigned: \* ELIGIBILITY INQUIRY USER  
CLAIMS USER  
RESTRICTED ADMIN

Login History:

Last Successful Login: 11/1/2010 11:06:35 AM  
 Last Password Change: 10/29/2010 4:31:31 PM  
 Failed Login Count: 0  
 Last Failed Login:

**Save** **Cancel** **Delete**

Figure 19 – End a User's Session In Progress

## Claim Record Purge

In order to keep the Web Portal running efficiently, a systematic purge of old claim records from each database must be conducted on a regular basis. However, you can set a shorter timeframe for purging of these records from your database by using the **Claims/PAR Purge** menu option on the main Web Portal screen (Figure 20).

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Welcome [Redacted] Thursday, August 28, 2014

Trading Partner ID- [Redacted]

**Welcome to the Colorado Medical Assistance Program Secure Web Portal**

**What's New!**

Welcome to the Colorado Medical Assistance Program Web Portal UAT Environment.

No Message Found

**System Status Messages**

**Claims** Last Week First Week

Dental Claims		
Rejected:	1	0
Total Claims:	1	0

**Professional Claims**

Professional Claims		
Rejected:	1	0
Total Claims:	1	0

**Institutional Claims**

Institutional Claims		
Errors:	1	0
Total Claims:	1	0

**Eligibility** Last Week First Week

Eligibility		

**PAR** Last Week First Week

PAR		

**Figure 20** – Claims/PAR Purge Menu Option

The Purge Request screen enables you to modify the purge criteria days for either the claims or PARs or both (Figure 21).

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**Current Status**

<b>Total No. Of Claims</b> = 143	<b>Oldest Claims(Date of Entry)</b> = 3/4/2005
	<b>Oldest Claims(Date of Submission)</b> = 3/4/2005
<b>Total No. Of PARs</b> = 45	<b>Oldest PAR(Date of Entry)</b> = 4/13/2005
	<b>Oldest PAR(Date of Submission)</b> = 4/13/2005

---

**Retention Limit -Number of Days**



Purge Claims Older Than  days

Purge PARs Older Than  days

---

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**Figure 21 – Purge Request Screen**

Currently, the system purge default is to delete any claim or PAR that is two years or older from the date of submission. All claims and PARs that have a submission date older than the next weekly purge process will be deleted. An exception to the purge requirement is for a claim or PAR with a **Saved Status**. **Saved Status** claims or PARs can only be deleted individually using their corresponding Lookup screen **Delete** button.

To purge your database sooner than what the system default days are, simply enter the new day cut-off in the appropriate entry box. For example, if you would like to purge all claims older than one year from the next purge cycle, enter **365** in the appropriate field. You will not be able to submit a value greater than **730** days (two years).

Click on **Submit** to process the request or **Cancel** to return to the main Web Portal screen. If **Submit** is clicked, a Purge Request Confirmation screen will display (Figure 22).



**Figure 22** – Purge Request Confirmation Screen

On the Purge Request Confirmation screen, the criteria entered on the request screen will display. Read the message and click on either the **Accept** button to finalize the request or the **Cancel** button to return back to the Purge Request screen to change the day cutoff value.

**Note:** Once the **Accept** button is clicked and the purge process has been run on the system, the deleted records will be permanently removed from your Web Portal database.

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## System Reports

Located under the **System Reports** heading on the **Main Menu**, you will find several reports you will need to manage and monitor user activity.

### *Failed Login Report*

The **Failed Login Report** allows you to monitor failed logins in your Trading Partner organization. View the **Failed Login Report** frequently to determine who is not using the system properly with regard to logging in.

To retrieve a **Failed Login Report**:

1. Select **View Failed Login Report** from the **Main Menu** under **System Reports**.
2. In the Failed Login Report-Selection Criteria screen (Figure 23), choose the **From Date** and **To Date** for your report by either entering the date in the **mm/dd/yyyy** format or using the **Calendar** icon to bring up a calendar from which you can select the date.

**Failed Login Report - Selection Criteria.**


Enter Report Date Range :

From Date :\* 04/07/2011  To Date :\* 04/07/2011  Sort Report By :\* Failed Login Date ▼

**Generate Reports** **Cancel**

**Figure 23** – Failed Login Report - Selection Criteria Screen

- Choose the report sort order by clicking on the drop-down arrow for the **Sort Report By** field.
- Click on the **Generate Reports** button.
- The Failed Login Report screen (Figure 24) will display and can be printed by using the **Print** button.



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---

**Failed Login Report**

From : 04/07/2011 To : 04/07/2011

---

[Return to Failed Login Report Selection Criteria](#)

Trading Partner ID	User Name	Failed Login Date & Time	Reason For Login Failure
000001	USER ALPHA	04/07/2011 00:42:11	Your password has expired. Please choose a new password.
000002	USER BETA	04/07/2011 00:45:23	The login information entered is incorrect. Please reenter the User Name and Password.
000003	USER GAMMA	04/07/2011 00:45:33	The login information entered is incorrect. Please reenter the User Name and Password.
000004	USER DELTA	04/07/2011 01:21:41	Your password has expired. Please choose a new password.
000005	USER EPSILON	04/07/2011 02:10:42	Your password has expired. Please choose a new password.
000004	USER ETA	04/07/2011 02:55:25	The login information entered is incorrect. Please reenter the User Name and Password.
000001	USER THETA	04/07/2011 03:11:14	The login information entered is incorrect. Please reenter the User Name and Password.
000003	USER IOTA	04/07/2011 03:13:16	The login information entered is incorrect. Please reenter the User Name and Password.



[Return to Failed Login Report Selection Criteria](#)

Print

---

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Figure 24 – Failed Login Report Example

### Successful Login Report

The **Successful Login Report** allows you to monitor successful logins in your Trading Partner organization. View **the Successful Login Report** frequently to determine who is not using the system properly with regard to logging in.

To retrieve a **Successful Login Report**:

1. Select **View Successful Login Report** from the **Main Menu** under **System Reports**.
2. In the Successful Login Report-Selection Criteria screen (Figure 25), choose the **From Date** and **To Date** for your report by either entering the date in the **mm/dd/yyyy** format or using the **Calendar** icon to bring up a calendar from which you can select the date.



**Successful Login Report - Selection Criteria.**

Enter Report Date Range :

From Date :\* 04/07/2011  To Date :\* 04/07/2011  Sort Report By :\* Login Date ▼

**Generate Reports** **Cancel**

**Figure 25** – Successful Login Report - Selection Criteria Screen

3. Choose the report sort order by clicking on the drop-down arrow for the **Sort Report By** field.
4. Click on the **Generate Reports** button.
5. The Successful Login Report screen (Figure 26) will display and can be printed by using the **Print** button.



The screenshot shows the 'Successful Login Report' interface. At the top is a header with the Colorado state seal and the department name. Below the header is a navigation bar with links for 'Related Sites', 'Provider Services', 'CHP+', 'CICP', 'Old Age Pension', 'HIPAA', 'Main', 'Help', and 'Log Out'. The report title 'Success Login Report' is displayed, followed by 'From : 04/07/2011' and 'To : 04/07/2011'. A link 'Return to Successful Login Report Selection Criteria' is provided. The main content is a table with five columns: 'Trading Partner ID', 'User Name', 'Login Date Time', 'Logout Date Time', and 'Session Termination Reason'. The table contains 12 rows of data for various users, including 'USER ALPHA' and 'USERIOTA'. Below the table is another 'Return to Successful Login Report Selection Criteria' link and a 'Print' button. At the bottom, there is a footer with the department's address, contact information, and links to 'HCPF Home', 'StateHome', and 'Privacy Statement'.

**Success Login Report**  
**From :** 04/07/2011 **To :** 04/07/2011

[Return to Successful Login Report Selection Criteria](#)

Trading Partner ID	User Name	Login Date Time	Logout Date Time	Session Termination Reason
000001	USER ALPHA	04/07/2011 00:00:16	04/07/2011 00:00:42	User Logged Out.
000001	USER ALPHA	04/07/2011 00:00:44	04/07/2011 00:01:04	User Logged Out.
000001	USER ALPHA	04/07/2011 00:01:08	04/07/2011 00:01:34	User Logged Out.
000001	USER ALPHA	04/07/2011 00:01:44	04/07/2011 00:02:13	User Logged Out.
000003	USERIOTA	04/07/2011 00:02:14	04/07/2011 00:02:30	User Logged Out.
000003	USERIOTA	04/07/2011 00:02:32	04/07/2011 00:02:58	User Logged Out.
000003	USERIOTA	04/07/2011 00:03:00	04/07/2011 00:03:28	User Logged Out.
000003	USERIOTA	04/07/2011 00:03:34	04/07/2011 00:04:45	User Logged Out.
000003	USERIOTA	04/07/2011 00:04:47	04/07/2011 00:05:11	User Logged Out.
000003	USERIOTA	04/07/2011 00:05:13	04/07/2011 00:05:38	User Logged Out.
000003	USERIOTA	04/07/2011 00:05:40	04/07/2011 00:06:04	User Logged Out.

[Return to Successful Login Report Selection Criteria](#)

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**Figure 26 – Successful Login Report Example**

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